

LATEST #5

FORMS REQUIRED: FORM 1040, SCH A, SCH B, IT540, SCH E

INFORMATION RETURNS ATTACHED: FORM W-2(1), 1099(2)

ENTRIES NOT REQUIRING FORMS: FROM 1040

THIRD PARTY DESIGNEE: NONE

PREPARED BY: TAXPAYER

TAXPAYER:

NAME: LATESS L LUCKY (NAME CHANGE)

SSN: 400-00-4307

DOB: 7/24/1941

OCCUPATION: EVENT PLANNER

DISABLED: NO

PRES ELEC FUND: NO

DAYTIME PHONE: NOT GIVEN

BLIND: NO

ADDRESS: 456 WALNUT GROVE

BATON ROUGE LA 70807-1111

FILING STATUS: QUALIFYING WIDOWER

LINE 6D: 1

SPOUSE: MARY LUCKY DIED 10/20/2007

DEPENDENT INFORMATION: JIM LUCKY

DOB: 04/20/1990 AGE: 18 SSN: 400-55-2007 RELATIONSHIP: SON LIVED 12 MONTHS

SCHEDULE A

LINE 5: 1028

LINE 6: 2300

LINE 9: 3328

LINE10: 5350

LINE 15: 5350

LINE 16: 850

LINE 18: 850

LINE 20: 0

LINE 29: 9528

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SCHEDULE B

PART I

LINE 1: CITIZENS BANK	1625
CHASE BANK	479
TEXAS STATE BONDS	533

LA

CONSUMER USE

LA PURCHASE	2128
LOUISIANA CITIZENS INSURANCE CREDIT	222
TOTAL INSURANCE PREMIUMS	2367
MILITARY FAMILY ASSISTANCE	25
START PROGRAM DONATION	25
WILDLIFE HABITAT AND TRUST FUND	10
LOUISIANA CANCER FUND	5
LA ANIMAL WELFARE	5
COMMUNITY BASED PRIMARY HEALTH CARE	5
AMOUNT CREDITED TO 2009 INCOME TAX	225
LA STATE EMPLOYEE RETIREMENT	35800
ANNUAL RETIREMENT INCOME	6000
IRA DISTRIBUTION	8000
ROAD HOME	8000
OHOH INSURANCE	POLICY NO: 875946358123
PAID WITH EXTENSION	200

BANK OF AMERICA (PLEASE INPUT A RTN & ACCOUNT NUMBER THAT WILL WORK FOR YOU)

RTN: 065000090

ACCOUNT NUMBER: 4512352385 CHECKING

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FORMS 1040, W-2, FORMS W-2G

FORM 1040:

TAXPAYER'S FIRST NAME INITIAL LAST NAME	LATESS L LUCKY
TAXPAYER'S SOCIAL SECURITY NUMBER	400-00-4307
HOME ADDRESS (NUMBER AND STREET)	456 WALNUT GROVE
CITY STATE AND ZIP	BATON ROUGE LA 70807
TAXPAYER'S PRESIDENTIAL ELECTION CAMPAIGN FUND	NO
FILING STATUS	SINGLE
LINE 6A: YOURSELF (EXEMPTION)	X
NUMBER OF BOXES CHECKED ON 6A AND 6B	1
LINE 6D: TOTAL NUMBER OF EXEMPTIONS CLAIMED	1
LINE 7: WAGES SALARIES & TIPS	40565
LINE 8A: TAXABLE INTEREST	2100
LINE 8B:	533
LINE 15B: TAXABLE AMOUNT	8000
LINE 16B: TAXABLE AMOUNT	35800
LINE 21: ROAD HOME	8000
LINE 22: TOTAL INCOME	94465
LINE 37: AGI	94465
LINE 38: AGI	94465
LINE 39A: BORN BEFORE JAN 2, 1944	X
LINE 39C: STANDARD DEDUCTION INCLUDES REAL ESTATE	X
LINE 40: ITEMIZED DEDUCTION	12450
LINE 41: SUBTRACT	82015
LINE 42:	7000
LINE 43: TAXABLE INCOME	75015
LINE 44: TAX	11444

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LINE 46: ADD	11444
LINE 56: SUBTRACT	11444
LINE 61: TOTAL TAX	11444
LINE 62: FEDERAL INCOME TAX WITHHELD	14685
LINE 71: TOTAL PAYMENTS	14685
LINE 72: OVERPAID	3241
LINE 73A: REFUNDED	3241

STANDARD DEDUCTION WORKSHEET – LINE 40

LINE 1:	10900	
LINE 2:	NO	
LINE 4:	10900	
LINE 5:	1050	
LINE 6:	11950	
LINE 7:	YES	2300
LINE 8:		500
LINE 9:		500
LINE 10:		12450

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W-2

FORM W-2:

BOX A: EMPLOYEE'S SOCIAL SECURITY NUMBER **400-00-4307**

BOX B: EMPLOYER IDENTIFICATION NUMBER **95-1234567**

BOX C: EMPLOYER'S NAME ADDRESS & ZIP **PERFECT PARTY PLACE**

123 PARTY PLACE

BATON ROUGE LA 70807

BOX E: EMPLOYEE'S FIRST NAME INITIAL & LAST NAME **LATESS L LUCKY**

BOX F: EMPLOYEE'S ADDRESS & ZIP **456 WALNUT GROVE**

BATON ROUGE LA 70807

BOX 1: WAGES TIPS OTHER COMPENSATION **40565**

BOX2: FEDERAL INCOME TAX WITHHELD **6085**

BOX 3: SOCIAL SECURITY WAGES **40565**

BOX4: SOCIAL SECURITY TAX WITHHELD **2515**

BOX 5: MEDICARE WAGES AND TIPS **40565**

BOX 6: MEDICARE TAX WITHHELD **588**

BOX 9: ADVANCE EIC PAYMENT **0**

BOX 15: EMPLOYER'S STATE ID NUMBER **5678901001**

BOX 16: STATE WAGES TIPS ETC **40565**

BOX 17: STATE INCOME TAX **1028**

LATEST #5

1099R

PAYER'S NAME

CAPITAL ONE

PAYER'S STREET ADDRESS

3000 N DAKOTA ST

CITY STATE ZIP CODE

BATON ROUGE LA 70802

PAYER'S FEIN

57-8888875

RECIPIENT'S ID

400-00-4307

RECIPIENT'S NAME

LATESS L LUCKY

STREET ADDRESS

456 WALNUT GROVE

CITY STATE ZIP CODE

BATON ROUGE LA 70807

LINE 1:

8000

LINE 2A:

8000

LINE 4:

1600

LINE 7:

7 IRA/SEP/SIMPLE X

LATEST #5

1099R

PAYER'S NAME

LASERS

PAYER'S STREET ADDRESS

3000 N 3RD ST

CITY STATE ZIP CODE

BATON ROUGE LA 70805

PAYER'S FEIN

57-8888875

RECIPIENT'S ID

400-00-4307

RECIPIENT'S NAME

LATESS L LUCKY

STREET ADDRESS

456 WALNUT GROVE

CITY STATE ZIP CODE

BATON ROUGE LA 70807

LINE 1:

35800

LINE 2A:

35800

LINE 4:

7000

LINE 7:

7

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IT540

LINE 7: FED AGI SCHEDULE E X	51230
LINE 9: FEDERAL INCOME TAX	11444
LINE 10: LA TAX TABLE INCOME	39786
LINE 11: LA INCOME TAX	895
LINE 13: EDUCATION CREDIT	25
LINE 15: TOTAL	25
LINE 16: ADJUSTED LA INCOME TAX	870
LINE 17: CONSUMER USE TAX X	170
LINE 18: TOTAL	1040
LINE 22: LA INSURANCE CREDIT	222
LINE 23: LA PROPERTY INSURANCE CREDIT	150
LINE 25: AMOUNT OF LA TAX WITHHELD	130
LINE 29: EXTENSION PAYMENT	200
LINE 30: TOTAL REF TAX CREDITS & PAYMENTS	1600
LINE 31: OVERPAYMENT	560
LINE 33: ADJUSTED OVERPAYMENT	560
LINE 34: MILITARY FAMILY ASSISTANCE	25
LINE 35: START PROGRAM	25
LINE 36: WILDLIFE HABITAT	10
LINE 37: LA PROSTATE CANCER	5
LINE 38: LA ANIMAL WELFARE	10
LINE 39: COMMUNITY BASED PRIMARY HEALTH	5
LINE 40: TOTAL DONATIONS	80
LINE 41: SUBTOTAL	480
LINE 42: AMOUNT TO BE CREDITED TO 2009	225
LINE 43: AMOUNT TO BE REFUNDED	255

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SCHEDULE E

LINE 1: FEDERAL AGI	94465
LINE 2: INTEREST INCOME	533
LINE 3: TOTAL	94998
LINE 4A: LA STATE EMPLOYEE RETIREMENT 02E	35800
LINE 4B: ANNUAL RETIREMENT INCOME 06E	6000
LINE 4C: ROAD HOME 11E	8000
LINE 4I: EXEMPT INCOME	49800
LINE 4J: FEDERAL TAX APP TO EXEMPT INC	6032
LINE 4K: EXEMPT INCOME	43768
LINE 5A: LA AGI	51230
LINE 5C: LA AGI	51230

LA STATE EMPLOYEES' RETIREMENT BENEFITS RETIREMENT DATE 10/97

ANNUAL RETIREMENT INCOME EXEMPTION FOR TAXPAYERS 65 OR OVER IRA